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ABSTRACT

This booklet is a brief annotated bibliography intended to aid prospective instructors in using the Inservice Training Manual that was developed as part of the Educational Management Project, a comprehensive inservice program for educational administrators. The publications listed were selected to provide background information relevant to one or more of the Study Group Sessions outlined in the Inservice Training Manual. Accordingly, entries are arranged by session number to aid readers in identifying those publications that are most crucial to any particular session. Between one and four entries are listed under each session number.
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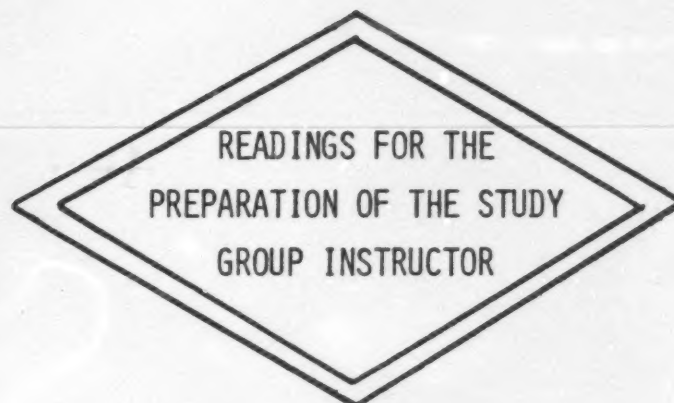
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THE EDUCATIONAL MANAGEMENT PROJECT

E.S.E.A. TITLE III

TUCSON PUBLIC SCHOOLS

TUCSON, ARIZONA



Peter G. Gazzola
Project Director

Sherrie Schager,
Management Specialist

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Readings for the Preparation of the Study Group Instructor

Preface

As the prospective instructor of one or more of the Study Group sessions, you should not rely exclusively on the session outlines and handouts in preparing for your task. Unless you have some specific background in the topic(s) covered by the session(s) you plan to conduct, instructing your participants from a "cold" outline will not have desirable results. The outlines are necessarily skeletal to allow for the interchange of responses among the participants and to give the instructor a degree of flexibility in responding to participant reactions. Remember that the session outlines are not scripts which can be successfully recited by an uninformed instructor; they are instead guidelines to help you stay on course when you are leading a study group under real conditions.

The following bibliography has been prepared to help you acquire the background you will need to conduct the Study Group sessions more effectively. These readings are arranged by session so you can identify those books or articles which are the most crucial to the session(s) you want to conduct. By studying these sources carefully, you may not automatically become an "expert," but you will be far more capable of understanding the instructions given in the outlines and more capable of responding successfully to the questions of the participants in your group.

Sherrie Schager
Management Specialist
Educational Management
Project
E.S.E.A. Title III

REQUIRED READING FOR CONDUCTING
THE MANAGEMENT STUDY GROUP SESSIONS

SESSION 1 THE FUNCTIONS OF EDUCATIONAL MANAGEMENT

Cook, D. L. *Educational project management*. Columbus: McGraw-Hill, 1971.

Part I (Chapters 1-4) of this book is essential to an understanding of management in the educational world. The discussion of the distinctions between project and program and between administration and management are especially pertinent to Session 1. Implicit in the Study Group's definition of management is the assumption that educational efforts must be perceived as aggregates of projects, in Cook's sense of the word, rather than as programs. Cook also integrates these distinctions with the concept of the management process as comprised of the four functions of planning, organizing, directing and controlling.

Educational Management Project (E.S.E.A. Title III). *Concepts and principles of educational management: An introduction*. Tucson Public Schools and the Arizona Department of Education, Title III Division, 1971.

This paper is an attempt to define and relate the four functions of educational management to the system concept, the Project's model of a decision-making situation and the six-step problem-solving process of Roger A. Kaufman. The paper constitutes an early rationale for the content and structure of the Study Group program and as such, will help the prospective instructor gain a better understanding of the philosophical and technical orientations of the Study Group.

Koontz, H. D. & O'Donnell, C. *Principles of management: An analysis of managerial functions*. New York: McGraw-Hill, 1964.

This large text is one of the primary sources of the content of the Study Group sessions, so it should be read in its entirety. Minimum preparation for Session 1 should include the study of Chapters 3, 6, 12, 25 and 29. As you read this text, you must translate the theory and practices discussed into educational terms since Koontz and O'Donnell prepared it for use in business and industry. Their fifth function, the staffing function, is subsumed under the organizing function in the context of the Study Group sessions. Since the Koontz and O'Donnell framework is a goal-based theory of management, it is highly suitable to the educational context which is becoming increasingly involved in systematic, goal-based management of programs.

SESSION 2 COMPONENTS OF THE DECISION SITUATION

Kaufman, R. A. System approaches to education: Discussion and attempted integration. Part III in P. K. Piele and T. L. Eidell (Eds.), *Social and technological change: Implications for education*. Eugene, Oregon: Center for the Advanced Study of Educational Administration, 1970.

The Study Group model of the components of a decision situation is derived from Kaufman's discussion of the elements of a problem. Kaufman defines and illustrates the two concepts of "what is" and "what ought to be" as the first two dimensions of a problem. The problem solving process he proposes is similar, though not identical, to the decision-making process of the Study Group. Studying this process will help in the understanding of the five-step decision-making process.

Kaufman, R. A. *Educational system planning*. Englewood Cliffs: Prentice-Hall, 1972.

Chapter 3 is an especially important chapter to read in preparation for Session 2. Kaufman's definition of a need as a discrepancy between "what is" and "what ought to be" is one of the fundamental concepts of the Study Group. An understanding of the decision model and its relationship to educational problem solving and decision making is essential for the Study Group instructor.

SESSION 3 THE DECISION-MAKING PROCESS

Morell, R. W. *Management: Ends and means*. San Francisco: Chandler, 1969.

The entire book is a useful tool for understanding the dynamics of decision making in organizations. Chapters 8 and 9 were the sources of the Study Group's five-step decision-making process and the Session 3 decision-making flowchart respectively. Reading this book will help the Study Group instructor avoid the temptation to oversimplify the decision-making process by forcing him to recognize the psychological and philosophical factors which influence decision making.

SESSION 4 COMMUNICATION FOR UNDERSTANDING

Schmuck, R. A., et. al. *Handbook of organization development in schools.* Eugene, Oregon: Center for the Advanced Study of Educational Administration (National Press), 1972.

Chapter Three, Clarifying Communication, defines the three kinds of communication which are the subjects of Session 4 and offers a wealth of data gathering instruments and group exercises for improving communication in an educational setting.

SESSION 5 COMMUNICATION FOR AGREEMENT

Janis, I. L., Groupthink. *Psychology Today*, November, 1971, pp. 43-45, 74-76.

In addition to this informative article, an excellent film, "Groupthink", is available from the publishers of *Psychology Today* (CRM). The concept of Groupthink is carefully described in the Janis article and well illustrated by the film. Being able to distinguish true consensus from a decision reached as the result of Groupthink is an important skill for the Study Group instructor since the concept of consensus is so easily misapplied in practice.

Schmuck, R. A., et. al. *Handbook of organization development in schools.* Eugene, Oregon: Center for the Advanced Study of Educational Administration (National Press), 1972.

(See Session 4, Communication for Understanding.)

SESSION 6 EFFECTIVE MEETINGS AND COMMITTEES

Koontz, H. D. & O'Donnell, C. *Principles of management: An analysis of managerial functions.* New York: McGraw-Hill, 1964.

Chapter 19 provides excellent information about the functions of committees in formal organizations and some of the ways committees are frequently misused as solutions to problems which could be handled more effectively by other means.

Schmuck, R. A., et. al. *Handbook of organization development in schools.* Eugene, Oregon: Center for the Advanced Study of Educational Administration (National Press), 1972.

Chapter Six, Improving Meetings, was a primary source for Session 6, and offers explanations of the principles which determine effective committee action. This chapter supplies many ideas which can be used to supplement and extend Session 6 beyond its present objectives if the instructor feels his Study Group could benefit from additional work on committees and meeting behavior.

SESSION 7 EDUCATIONAL NEEDS AND PROBLEMS and

SESSION 8 NEEDS ASSESSMENT PROCEDURE AND TECHNIQUES (See references for Session 2)

SESSION 10 PROBLEM IDENTIFICATION AND ANALYSIS

Stufflebeam, D. L., et. al. (PDK National Study Committee on Evaluation). *Educational evaluation and decision making.* Itasca, Ill.: F. E. Peacock, 1971.

Chapter 3, Educational Decision Making, not only provides another perspective on the Study Group's five-step decision-making process, but also discusses the kinds of charge settings in which decision making occurs. Handout 10-1 of Session 10 is based on Stufflebeam's taxonomy of decision settings; only his terms for each setting were omitted as it was judged more important to concentrate on the substantive differences among these settings than on the names given them by the author. Handout 10-1 is inadequate preparation for leading the Study Group discussion, however, so the instructor should study this entire chapter carefully.

SESSION 11 RELATING MEANS TO ENDS

Stufflebeam, D. L., et. al. (PDK National Study Committee on Evaluation). *Educational evaluation and decision making.* Itasca, Ill.: F. E. Peacock, 1971.

The means-ends matrix developed for use in Session 11 is derived from Stufflebeam's taxonomy of types of decisions (Chapter 3).

NOTE: Further discussion of the ends-means dichotomy is also to be found in Kaufman's *Educational System Planning* (See Session 2) and in Morell's *Management: Ends and Means* (See Session 3). Desmond Cook's definition of planning (See Session 1) also provides insight into the elements of plans which represent means and those which represent ends. Since being able to make the distinction between means and ends is so crucial to the understanding of goal-based management, these sources should all be carefully studied.

SESSION 12 GOALS AND OBJECTIVES

Developing and writing behavioral objectives. Tucson: Educational Innovators Press, 1970.

A small booklet excellent for self-study in learning how to write behavioral objectives using the taxonomies of educational objectives developed by Bloom and Krathwohl (cognitive, affective and psychomotor domains).

Mager, R. F. *Goal analysis.* Belmont, Calif.: Fearon, 1972.

The primary source of the content of Session 12. A practical guide for the conversion of goal statements to lists of measurable performance objectives. This well-illustrated and entertaining book should be studied carefully.

Mager, R. F. *Preparing instructional objectives.* Palo Alto: Fearon, 1962.

This programmed instruction book has become a classic tool for learning to write behavioral objectives for classroom use. While no reference is made to the use of objectives at program or school levels, the instructor should be aware of the kind of objective-writing technology with which educators have become most familiar.

Performance and process objectives. Tucson: Educational Innovators Press, 1970.

An excellent booklet for acquiring a definitive understanding of the differences between behavioral and performance objectives and between performance and process objectives.

SESSION 13 STRUCTURING PHASE OF THE PLANNING FUNCTION

Cook, D. L. *Educational project management*. Columbus: McGraw-Hill, 1971.

Part 2, Project Planning and Controlling Procedures, consists of seven chapters, each of which describes one of the steps of the planning process. The work-breakdown structure, PERT charting and time scheduling are described and illustrated as the primary tools for developing a management system for a project.

SESSION 14 THE CONTROLLING FUNCTION OF MANAGEMENT

Cook, D. L. *Educational project management*. Columbus: McGraw-Hill, 1971.

Cook's concepts of planning and controlling are helpful in understanding the interrelationship of these two functions.

Koontz, H. D. & O'Donnell, C. *Principles of management: An analysis of managerial functions*. New York: McGraw-Hill, 1964.

Chapters 29-32 describe the controlling function of management in enough detail that the Study Group instructor could be better prepared to conduct Session 14.

SESSION 16 THE DIRECTING FUNCTION OF THE EDUCATIONAL MANAGER

Koontz, H. D. & O'Donnell, C. *Principles of management: An analysis of managerial functions*. New York: McGraw-Hill, 1964.

Chapters 25-28 are an excellent introduction to the dimensions of the directing function and should be studied carefully in preparation for Session 16.

SESSION 17 EFFECTIVE LEADERSHIP STYLE

Management style diagnosis test. Organizational Tests Ltd., Box 324, Fredericton, N. B., Canada.

This is a standardized self-assessment instrument for identifying dominant and supportive leadership styles among administrators. The theory upon which the test is based is the 3-D Theory of Managerial Effectiveness, originated by W. J. Reddin. The test materials are accompanied by interpretive materials including

comparisons of dominant styles characteristic of different kinds of organizations.

Reddin, W. J. *Managerial effectiveness*. New York: McGraw-Hill, 1970.

It is absolutely essential that the Study Group instructor read and study this book since it is the sole source of the content of Session 17. Former Study Group participants have shown great interest in the 3-D Theory of Managerial Effectiveness, so it is important that their instructor have a firm understanding of the elements of the theory and their interrelationships.

SESSION 19 THE ORGANIZING FUNCTION OF MANAGEMENT

Koontz, H. D. & O'Donnell, C. *Principles of management: An analysis of managerial functions*. New York: McGraw-Hill, 1964.

Chapters 29-32 describe the principles which govern formal organization, approaches to departmentation, and the standard distinctions between kinds of authority in an organization. Special attention should be paid to Chapter 16 on line and staff authority relationships in preparation for Session 19.